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ABSTRACT

Rules and guidelines are provided for the process of acquiring documents to be considered for inclusion in the ERIC database. The differing responsibilities of the Government, the ERIC Clearinghouses, and the ERIC Facility are delineated. The various methods by which documentary material can be obtained are described and preferences outlined. Sample solicitations are provided covering different situations. The need for proper recordkeeping and forms is emphasized and examples are given of form letters, reply cards, thank you notes, in-process records, scope overlap notices, reproduction release forms, etc. The system-wide list entitled "ERIC Acquisitions Arrangements" is described. Acquisitions as it applies to the "Current Index to Journals in Education" is covered under the headings: comprehensively covered journals; selectively covered journals; "oneshop" journals. (TB)

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ERIC®

# PROCESSING MANUAL

Rules and Guidelines for the Acquisition, Selection, and Technical Processing of Documents and Journal Articles by the Various Components of the ERIC Network

## SECTION 2: ACQUISITIONS

November 1980

U.S. DEPARTMENT OF EDUCATION
NATIONAL INSTITUTE OF EDUCATION
EDUCATIONAL RESOURCES INFORMATION CENTER (ERIC)

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# Section II: Acquisitions

# ACQUISITIONS

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# ACQUISITIONS

## SUMMARY OF SIGNIFICANT RULES

1. Clearinghouses have the basic responsibility for acquiring those documents that deal with their subject areas. Clearinghouse efforts are supplemented by those of Central ERIC (NIE and OE reports) and the ERIC Facility (Federal and Inter-Governmental documents).

2. An acquired document may be selected or rejected, but an unacquired document never receives the benefit of an informed evaluation. Therefore, while some selectivity should be exercised in acquiring documents, if potential exists and resources permit, it is better to acquire than to make a judgment sight unseen.

3. Arrangements that cause documents to be received automatically, whenever they first become available, are generally more productive and more economical than on-demand after-the-fact efforts; in addition, they result in more timely receipt of documents.

4. Exchange arrangements must be monitored to ensure their effectiveness (are the documents bargained for being received?) and their fairness.

5. Each Clearinghouse is responsible for establishing basic control over the documents that it has on-order and in-process.

6. Clearinghouses are responsible for obtaining reproduction releases for all documents they enter into the ERIC system (except uncopyrighted documents produced by or funded by the Federal Government). Releases are often best obtained during the original acquisition process.

7. Department of Education contractor reports must be released by their respective monitors before they can be processed for ERIC. Such reports received from the Facility can be considered released.

8. Whenever possible, documents should be obtained on a complimentary or free basis (citing the many advantages of being in the ERIC system). Documents should be purchased only when they cannot be obtained in any other way and when their value to the system justifies the expense.

9. Documents that are available only from sources outside the United States may be acquired, but they must meet more stringent selection criteria than domestic documents.

10. Any ERIC component may make a recommendation that a given journal be covered by CIJE; however, responsibility for the decision to cover or not rests with the Clearinghouse to which the journal would be assigned for processing.

## II. ACQUISITIONS

### A. Introduction

Productive use of the ERIC Data Base is dependent upon the quality and comprehensiveness of the input to it. Acquisitions is the critical first step in building the data base. The acquisitions activity provides the raw material for all the functions that follow:

- selection;
- processing (cataloging, indexing, abstracting);
- announcement;
- retrieval;
- dissemination.

In the ERIC system, all components play a role in acquisitions. This section covers the responsibilities of each of these components, the various techniques used for acquiring documents, and the ways that balance and coordination are achieved between distant elements of the system.

### B. Acquisitions Responsibilities

Four separate acquisitions efforts go on concurrently within the ERIC system. All work cooperatively to provide comprehensive coverage of the report literature of education (for announcement in RIE) and of the journal literature of education (for announcement in CIJE).

#### 1. Central ERIC

Central ERIC establishes the basic policies governing all acquisitions work. In addition, Central ERIC has responsibility for the acquisition of reports prepared under contract or grant with the National Institute of Education and the U.S. Office of Education (and their counterparts in the Department of Education). Central ERIC controls the overall number of journals covered by CIJE.

#### 2. Clearinghouses

The ERIC Clearinghouses have basic responsibility for establishing document acquisitions programs covering comprehensively their respective subject areas. Each Clearinghouse has a designated "acquisitions" staff member responsible for acquiring documents, and subscribing to journals within the Clearinghouse's scope of interest.

#### 3. ERIC Facility

The ERIC Facility has basic responsibility for the Federal area (outside of NIE and OE); for State Departments of Education; for certain foreign, international, and inter-governmental arrangements; for major education associations; for general education publishers; and for systemwide coordination to avoid duplication of effort.

4. CIJE Contractor

While the Clearinghouses have responsibility for identifying, acquiring, evaluating, and making recommendations concerning coverage for all new education-related journals, the CIJE Contractor controls and coordinates all additions to coverage and, with Central ERIC, determines the overall number of journals to be covered.

C. Acquisitions Methods and Techniques

1. General

Among the various technical processing tasks involved in controlling a literature and building a data base, acquisitions is unusually dependent for its success on resourcefulness, inventiveness, and industry, and less dependent on the exact following of written policies and procedural rules (such as presented here). This is because there is not one single best way to bring documents in. The opportunities present themselves in a multitude of guises. They must be seized rapidly and with whatever accommodations and adjustments the situation calls for. The acquisitions librarian or specialist must be determined, able to solve problems, far-sighted, creative, and whatever else is necessary to ensure a steady inflow of potentially valuable documents.

The acquisitions process always contains an element of selection in that not everything can be obtained, priorities must be set, decisions must be made even as to what to go after. Nevertheless, a cardinal rule of the acquisitions process is, if resources permit, it is better to obtain a document than not. Once obtained, a document may be selected or rejected, but if it is never obtained in the first place, ERIC personnel never get a chance to exercise any selective or critical judgment with respect to it.

2. Acquisitions Tools

A wide variety of reference tools are useful in acquisitions work. Most prominent and numerous are the tools to be scanned in order to learn of promising new reports and documents, e.g.:

- newsletters of professional associations;
- professional journals;
- catalogs and flyers of publishers;
- other abstract journals;
- bibliographies and references included in documents and articles already selected for RIE or CIJE;
- calendars of upcoming conferences and meetings;
- directories that list organizations likely to be sources of relevant documents;
- research-in-progress compilations that pinpoint future producers, etc.

An active acquisitions effort typically builds up an extensive reference collection and also ensures the continued regular receipt of numerous serial publications that are regularly scanned. Examples are given in the Clearinghouse and Facility parts of this section.

3. Form Letters

Because of the large number of contacts required by the acquisitions process, it is often necessary to rely on form letters, or at least standard language which has been developed to make an optimum presentation of the requester's position, the advantage of giving a document to the ERIC system, etc., and which can be incorporated into the body of individual letters. With good printing and a personalized inside address and salutation, a form letter can appear quite "customized" and can be used in place of individual letters. There will, of course, always be instances in which original letters must be written. Nevertheless, form letters definitely have a time-saving role to play in acquisitions work, particularly in the initial contact phase. Most Clearinghouses make use of a variety of form letters to cover different situations. Examples are to be found in the Clearinghouse and Facility parts of this section.

4. Methods for Acquiring Documents

a. Unsolicited Receipts

An active acquisitions program is characterized by continuous personal and correspondence efforts to keep ERIC's document needs before potential contributors. A number of Clearinghouses have developed acquisitions brochures focusing on their specific areas of interest. These brochures were developed for distribution at conferences and for inclusion in mailing packets. Brochures, such as *Submitting Documents to ERIC* and *How to Use ERIC*, and the introductory matter to *Resources in Education*, also contain general information concerning ERIC's desire for educational literature and instructions for contributing documents. These and other efforts result in the receipt of documents which were never specifically solicited. Such receipts occur at all levels of the network, including EDRS, and must be routed to the appropriate Clearinghouse for processing.

Central ERIC and EDRS routinely route such documents to the ERIC Facility for assignment to the appropriate Clearinghouse. The Clearinghouses also transfer documents among themselves, as necessary.

This is one of the easiest ways to get documents, though not the most reliable. As public awareness of ERIC grows, more documents come into the system in this manner. Thank you letters and follow-up letters to contributors of this type sometimes result in continuing submissions or formal arrangements.

b. Automatic Distribution

The most productive kind of acquisitions arrangement for the ERIC system is one where Clearinghouses or the Facility arrange to be placed on an organization's mailing list to get all (or classes) of publications "automatically," as issued. The Clearinghouses and the Facility establish as many automatic acquisitions arrangements as possible. Such arrangements ensure early receipt of an organization's relevant material, usually on initial distribution. Where a request for a specific title nets one document, a successful request to be put on a distribution list may net many times that many documents over time.

All automatic acquisitions arrangements should be documented. All correspondence exchanged, together with the signed Blanket Reproduction Release form (if it is necessary), should be included in the documentation. A list of all such arrangements is cumulated by the Facility in the semiannual *ERIC Acquisitions Arrangements* (EAA) list. All of these arrangements must be regularly monitored to ensure that they are working and to determine which arrangements may have ceased to be productive.

c. Requests for Specific Titles

Specific titles of documents relevant to the field of education come to the attention of acquisitions personnel by a variety of channels:

- requests from users, the public, or other staff members;
- news releases, newsletters, and other rapid announcement sources;
- conference announcements and programs;
- conventional media regularly read or scanned, e.g., reviews, professional and association journals, newspapers/radio/TV;
- library acquisitions tools, e.g., *Publishers Weekly*; other abstract journals, e.g., *Government Reports Announcements*; acquisition lists of certain libraries and information centers, bibliographies in received documents, etc.

The acquisition of specific titles usually involves an individual written request (and reproduction release) directed at the author, sponsor, publisher, or other source. Sometimes a modified form letter (citing the specific title desired) can be used; sometimes a telephone call can be employed. Sometimes a request for a single title will lead to an offer of other related publications or an offer to send future publications as

issued. For the most part, however, requests for specific titles are a one-for-one proposition, i.e., one successful request nets one title. All requests should be, at least initially, for complimentary or review copies, relying on the many advantages ERIC has to offer to persuade sources to contribute their output free of charge.

Records should be kept of each title so requested, in order to avoid duplicate requests (irritating to the source and wasteful of effort), and in order to be able to respond knowledgeably to all inquiries about documents in process. As materials are received and included in the system, this outstanding request or on-order file must gradually be purged to keep its size manageable.

d. Purchase

While most documents can be acquired for ERIC free of charge or via exchange, some few must be purchased. Prime examples of valid documents that must be purchased are those acquired by the Facility from the Government Printing Office and UNESCO. Other material is available from a wide variety of commercial or non-profit publishers (or authors) who have either copyrighted the document in question or otherwise restricted its reproduction in order to be able to sell it to defray publishing expenses.

Purchases should be made when necessary to obtain a valuable and useful title; however, they should always be scrutinized carefully and made deliberately, with full awareness of the ERIC selection criteria (enumerated in Section III), If reproduction releases (for Level 1 or Level 2 input) cannot be obtained, the document must be entered at Level 3. It is not advantageous to the RIE journal, the microfiche collection, or the system in general, to have an excessive number of non-reproducible Level 3 announcements, where the user must be directed outside the ERIC system for access. Level 3 input into RIE has decreased over the last few years to around 5%. This seems to be an acceptable level and Clearinghouses should keep this statistic in mind when evaluating their own volume of Level 3 input. (Please note that GPO documents should enter the system at Level 1 (see Section II.8.d).)

Two purchasing arrangements which can be used for ordering are:

(1) Specific Orders

The same guidelines and observations that apply to the section above on "Requests for Specific Titles" apply equally here. The only difference is that the necessity of paying requires completion of a formal "Purchase Order," or its equivalent, the establishment of an account, or requesting and paying invoices.

(2) Standing Orders

Standing orders are, in effect, subscriptions for all the publications (or relevant classes of publications) produced by a given source. Standing orders are only possible in those instances where the source (or jobber) offers the service. Standing orders often have the advantage of reducing the time to acquire, cutting paperwork, lowering overall costs, and most importantly, assuring comprehensive acquisitions. An example of a standing order would be the ERIC Facility's arrangement with UNIPUB (the U.S. agency for UNESCO publications).

e. General Solicitation

The solicitation notices contained in RIE and the various Clearinghouse brochures are essentially undirected. They are not addressed to particular institutions, nor do they request particular documents. There are many opportunities during the year, however, to direct similar general solicitations to specific organizations and activities. In such situations, the solicitation is not typically for specific documents, but rather for everything that the activity produces. The purpose is not to try to set up a permanent distribution list arrangement, but rather to try to take advantage of a temporary and often transient opportunity.

Professional meetings, conferences, symposiums, seminars, workshops, colloquiums, etc., are good examples of such opportunities. ERIC acquisitions staff who learn of relevant activities of this type (particularly those geographically close by) may participate at various levels, e.g.:

- write for proceedings and papers;
- attend the activity;
- participate in the program;
- establish a booth, etc.

Whatever level of participation is chosen, the acquisitions person involved should take every opportunity to publicize ERIC and make its document needs known, e.g.:

- distribute name cards;
- hand out brochures and materials describing the ERIC system and the need for contributor input;
- request preprints or copies of papers from individual speakers, session leaders, or the conference director.

Persons representing ERIC at such activities are strongly urged to remember to solicit for the system in general and not just for their own element of the system. Sometimes the solicitation for conference papers can be a cooperative undertaking between the host association and a Clearinghouse on behalf of the ERIC system. For example, the annual American Educational Research Association (AERA) meeting papers are collected by the ERIC Clearinghouse on Tests, Measurement, and Evaluation (TM) for assignment to the network.

f. Exchanges

Exchanges are a variation of automatic distribution. Most of ERIC's solicitations are for free copies of publications (with ERIC offering in return the advantages of announcement, indexing, inclusion in the machine-readable data base, reduction to microfiche, and constant availability). Sometimes, however, *quid pro quo* exchanges may be the best way to acquire publications from certain organizations, e.g., foreign ministries of education. The Clearinghouses may offer their own newsletters, bibliographies, and other publications. Exchanges should be regularly and carefully monitored to ensure that ERIC is receiving the desired publications and that what is being received is a fair exchange for the ERIC material being sent.

D. Central ERIC Role in Acquisitions

1. Policy Setting, Guidance, Coordination, Monitoring

As with all phases of the ERIC program, Central ERIC sets the basic acquisitions policies to be followed. Central ERIC determines what kinds of documents are suitable for RIE and has formalized these decisions in the selection criteria stated in Section 3, "Selection." Central ERIC approves the scope of interest of each Clearinghouse, (See Appendix A) thereby establishing those areas of the field of education for which each has responsibility. The format and frequency of the basic duplicate checking tools, e.g., *Title Index, Acquisitions Data Report, ERIC Acquisitions Arrangements*, used in acquisitions are dictated by Central ERIC. The statistical and narrative reports required of each element of the network are detailed by Central ERIC (see the *Administrative Procedures Manual*). Central ERIC monitors all network activities, including acquisitions, as to the adequacy of performance and compliance with contract conditions.

Each network component has a designated monitor at Central ERIC with whom to discuss problems. In addition, Central ERIC designates one staff member as overall Acquisitions Coordinator. Both are available to acquisitions staff to answer questions concerning document acquisitions, reproducibility, selection, copyright, PRIORITY documents, and scope overlap.

Contact between Central ERIC and the ERIC Facility is particularly frequent insofar as Department of Education documents flow on a daily basis from the former to the latter. Central ERIC coordinates acquisition by the Facility of the documents of State Departments of Education and foreign ministries of education. There are frequent requests for information concerning the receipt or status of particular documents. In addition to actual documents, many notices of publications, conferences, and sources of educational materials come to the attention of Central ERIC staff and are passed on to the Facility.

2. Acquisitions Responsibilities

Central ERIC has reserved to itself the acquisition of certain classes of documents. It acquires the formal publications and contractor reports of the Department of Education. It negotiates arrangements for receipt of publications from some foreign institutions and several international organizations (sometimes offering complimentary distribution of RIE in exchange). Central ERIC coordinates the acquisitions of State documents through the Facility. All reports and documents acquired by Central ERIC, whether actively or on an unsolicited basis, are forwarded to the ERIC Facility for assignment to the appropriate Clearinghouses. One of the important procedural objectives in handling acquisitions centrally (by either Central ERIC or the ERIC Facility) is to avoid multiple solicitations from various ERIC network components, all converging on (and confusing) Government agencies or foreign organizations.

3. PRIORITY Documents

Central ERIC occasionally designates certain important documents, particularly OE and NIE reports, as "PRIORITY Documents." A special identifying notice is affixed to these documents (see Figure II-1). Questions or problems concerning reproducibility or copyright are resolved before sending them to the Facility for Clearinghouse assignment, so that PRIORITY documents can proceed as rapidly as possible through the system.

There are only two classes of document handling: "ROUTINE" and "PRIORITY." "PRIORITY" status indicates to the Clearinghouse that processing must take place as quickly as necessary to ensure that the document appear in the earliest possible issue of RIE. (This can be determined from the Master Schedule.) If the deadline of an issue is close, this can sometimes require virtually 24-hour turnaround. The handling of PRIORITY documents is described in detail in Section IV.

If, for any reason, a PRIORITY document is not selected for announcement in RIE, this decision should be communicated by the Clearinghouse to its monitor as quickly as possible.

DO NOT REMOVE FROM DOCUMENT CLEARINGHOUSE NO. _____

PRIORITY

Please EXPEDITE the processing of the attached report and, if selected, return it to the ERIC Facility for announcement in the _____issue of RIE.

EFF-39

FIGURE II-1: NOTICE IDENTIFYING A DOCUMENT TO BE ACCORDED PRIORITY HANDLING

E. Clearinghouse Acquisitions Efforts

1. General Mandate

The primary responsibility in ERIC for acquisitions and the bringing in of documents to the system has always been and continues to be with the ERIC Clearinghouses. Each Clearinghouse is responsible for ensuring a steady flow into RIE of high-quality documents in its special area of education.

In order to qualify for RIE, documents must:

- fall within the field of education, broadly defined;
- meet the criteria set forth in Section 3, "Selection," with regard to its physical characteristics (i.e., size and legibility), content, and quality.

Documents which fail to satisfy the basic requirements are not to be input to RIE, but may be kept for local collections (unfunded by ERIC), if desired. *If a document falls outside the scope of interest of the Clearinghouse considering it, it should be transferred to the appropriate Clearinghouse for evaluation, rather than discarded.*

2. Kinds of Documents to Be Acquired

The following are examples of the types of materials which should be acquired as candidates for RIE:

- Bibliographies, Annotated Bibliographies;
- Conference Papers;
- Evaluation Studies;
- Feasibility Studies;
- Instructional Materials/Curriculum Materials;
- Legislation and Regulation;
- Manuals, Guides, and Handbooks;
- Monographs, Treatises;
- Opinion Papers, Position Papers;
- Proceedings;
- Program/Project Descriptions;
- Research Reports/Technical Reports;
- Resource Guides;
- Speeches and Presentations;
- State of the Art Studies;
- Statistical Compilations;
- Taxonomies and Classifications;
- Teaching Guides;
- Tests, Questionnaires, Measurement Devices;
- Vocabularies, Dictionaries, Glossaries, Thesauri.

The following types of journals should be acquired for coverage by CIJE:

- Education journals (high quality and totally devoted to education) for *comprehensive* cover-to-cover indexing of all articles;
- Education-related journals (high quality, but not totally devoted to education), for *selective* coverage of only those articles relevant to education;
- Journal articles (relevant to education, but contained in journals that do not ordinarily cover educational topics), and that are not regularly covered by CIJE, for ad hoc selection and indexing as identified. Sometimes called "oneshot" articles. (See Section II.G.)

ERIC would like to be given the opportunity to examine virtually any document dealing with any aspect of education. The ERIC audience is so broad (encompassing teachers, administrators, librarians, researchers, media specialists, students, counselors, and every other variety of educator) that it must collect a wide variety of documentation in order to satisfy its users.

3. Sources of Documents

The Clearinghouses are responsible for acquiring documents issued by all organizations, except those reserved to Central ERIC (see Section II.D) and to the ERIC Facility (see Section II.F).

Some documents arrive unsolicited, and others are received from the ERIC Facility. For most acquisitions, however, the Clearinghouses must rely on such contacts as:

- appropriate professional societies and academic institutions;
- people known to be working in the field, specific State or local officers responsible for programs relevant to the Clearinghouse subject area;
- foundations or other organizations sponsoring education projects, publishers, institutes, speech-makers, information centers;
- a wide variety of other individuals and organizations concerned with education.

The following acquisitions strategies for different classes of contributors have been reported by various Clearinghouses:

a. Previous Document Contributors

- Send letters to "automatic contributors," thanking them for past cooperation and asking them to continue to contribute documents.
- Contact authors of Clearinghouse Information Analysis Products, reminding them that the Clearinghouse is interested in reviewing appropriate documents that may come to their attention.
- Send complimentary microfiche to contributing institutions/ authors.

b. Conferences

Conferences can be a lucrative source of documents, and Clearinghouses should be alert to all conferences in their subject area. In addition, Clearinghouses may coordinate with other elements of the network in covering all papers and products of a large or general conference in their geographic area, later forwarding those outside their own particular subject scope to the Facility for assignment elsewhere in the network. An exemplary arrangement for the collection of conference papers are those established by TM to obtain AERA papers and CG to obtain APA papers. For typical form letters used by Clearinghouses see Figures II-2 and II-3.

Clearinghouses should be aware of the following methods of obtaining documents from conferences:

- If an organization collects the speeches at its conferences, request that a set be collected for the Clearinghouse, or
- Suggest that the program committee chairperson endorse a solicitation letter or distribute acquisitions letters and brochures on behalf of the Clearinghouse, or
- Ask for a program, mailing list, directory of participants' and then solicit papers directly from participants.

The *ERIC Conference Calendar*, prepared annually, lists all conferences in which Clearinghouses will participate that year, including those from which papers will be solicited. It is an essential tool for the coordination of conference-related acquisitions efforts.

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EDUCATIONAL TESTING SERVICE, PRINCETON, NEW JERSEY 08541
TELEPHONE: 609-921-9000

February 8, 1980

Dear Colleague:

We would like to obtain two copies of your presentation(s) at the 1980 Annual Meeting of the American Educational Research Association (AERA). Since 1971, ERIC/TM and the central office of AERA have cooperated in an attempt to collect all papers. Each one we receive will be considered for announcement in our abstract journal, Resources in Education, and subsequent availability through the ERIC Document Reproduction Service. The enclosed brochure contains a brief description of ERIC and lists the advantages of contributing documents.

Please observe the following guidelines when submitting your paper:

1. Complete and return the enclosed reproduction release with two copies of your paper.

2. Provide clearly typed/printed copies (to permit microfilming, a sharp contrast between typeface and background is essential).

3. Include a 100-200 word summary.

4. Use the enclosed postage paid mailing label.

If your paper is not available before the meeting, please bring it to the ERIC exhibit booth, No. 56, at the Civic Center or mail it to the Clearinghouse at a later date.

We look forward to hearing from you and hope you will be able to visit us in Boston.

Sincerely,

Carol Paskowsky

Carol Paskowsky
Acquisitions Coordinator

CP/bg
Enc.

FIGURE II-2: TYPICAL FORM LETTER USED BY CLEARINGHOUSES FOR OBTAINING DOCUMENTS FROM CONFERENCES (EXAMPLE 1)

Counseling and Personnel Services Clearinghouse

2108 School of Education The University of Michigan
Ann Arbor, Michigan 48109 (313) 764-9492

ERIC, the Educational Resources Information Center, is a United States Government funded project designed to acquire, store and disseminate educational information. The Counseling and Personnel Services Clearinghouse, CAPS, is one of sixteen clearinghouses covering various aspects of education which comprise the ERIC system. For your further information, we are enclosing a brochure that describes the system and the CAPS clearinghouse in greater detail.

We are writing to you as the contact person for the following Conference/Workshop.

CAPS would like to receive proceedings, programs, or any other publications resulting from this Conference and/or Workshop in order to request individual papers from the presenters. These papers will be reviewed for possible citation in the monthly index from the Government Printing Office, Resources in Education, RIE. The text of each paper then becomes available from the ERIC Document Reproduction Service, either in microfiche or hardcopy form. The ERIC system provides the educational community with access to current literature which might otherwise be unavailable or difficult to locate.

If, however, you intend to make the proceedings of your Conference/Workshop available in monograph or other form, CAPS also would be pleased to receive two copies of this for review and possible citation in RIE.

Sincerely,

Helen Mamarchev

Helen Mamarchev
Acquisitions Coordinator

HM/jl
enclosure

ERIC

Garry R. Walz, Director • Libby Benjamin, Associate Director • Carol K. Jaslow, Assistant Director

FIGURE II-3: TYPICAL FORM LETTER USED BY CLEARINGHOUSES FOR OBTAINING DOCUMENTS FROM CONFERENCES (EXAMPLE 2)

c. Professional Associations

- Obtain mailing lists from professional and/or academic organizations for direct mail campaigns to these individuals.
- Send special letters to sub-groups of professional organizations, i.e., racial and ethnic sections, women's caucus groups, etc.
- Attend meetings, participate in programs, etc.

d. Academic Institutions

- Use college catalogs or other reference books to identify graduate departments within the Clearinghouse's scope area. After contact, endeavor to establish an automatic arrangement and blanket permission so that all documents issued by the department are submitted to the Clearinghouse.
- Hold ERIC workshops in university libraries or education departments.

e. Foundations (Sponsoring Education Programs)

- Ask foundations to include a request that grantees submit resulting papers and final reports to ERIC.
- Supply foundations with ERIC brochures and other literature to distribute to the grantees.

f. Non-Profit Organizations Concerned with Education

- Send a printout of all documents contributed to RIE and CIJE by the organization in question. Request that all documents still available, but not on the printout, be submitted to ERIC. For a typical form letter see Figure II-4.
- If the Clearinghouse has a complimentary mailing list, add the organization to the distribution list for ERIC products and IAP's.

g. Journal Articles

Contact editors of appropriate journals for quality articles they have not been able to publish. Because of space limitations, journals can publish only a small number of papers they receive. A number of papers may be rejected but may meet the ERIC selection criteria. Journal editors can be contacted and asked to include information about ERIC when they send a letter of rejection to an author. The editors can include a sheet which states that ERIC would be interested in

ERIC EDUCATIONAL RESOURCES INFORMATION CENTER

*Clearinghouse on Higher Education*

THE GEORGE WASHINGTON UNIVERSITY

Enclosed is a list of your organization's publications submitted to the Educational Resources Information Center (ERIC) system since 1975. ERIC's purpose is to create wider awareness and availability of education-related literature. This is accomplished through announcements in the monthly bibliographic journal, Resources in Education, received by more than 5,300 libraries, the ERIC microfiche collections available in over 600 libraries, ERIC Document Reproduction Service (EDRS) dissemination, and computerized retrieval of information from the ERIC data base. ERIC's role can be even more significant with your continued participation.

The list is in chronological order, with your most recent publications cited first. The ERIC Document (ED) number assigned to each publication is included. All those without the double slash mark (//) are in the ERIC microfiche collection and are available to ERIC users.

Your clients will find it useful to know that your publications are available through ERIC. When you refer to your literature, it is beneficial to cite the document's ED number. A sample of the bibliographic format preferred is attached for your reference.

Microfiche or paper copies of your complete documents can be ordered through EDRS. This dissemination service is particularly useful for your limited-distribution or out-of-print publications. Ordering information from EDRS is included with this letter.

If you find that you have recent publications not yet submitted to ERIC, please send two copies of each report and, if possible, a 200-word abstract of each document. Mail them to the ERIC Clearinghouse on Higher Education with a copy of the attached copyright release form. Release permission is required, even if your publication is not copyrighted at this time, due to the new copyright law. The copyright release form may be copied for individual documents, or you may send in the "blanket release" form to indicate release for all papers submitted now or in the future.

Thank you for your contributions in the past. We look forward to continuing to receive your publications and being able to give them added visibility. I would also like to invite you to contact us whenever we may be of service.

Sincerely,

Jonathan D. Fife, Director

Enclosure

SUITE 630 / ONE DUPONT CIRCLE / WASHINGTON, D. C. 20036 / (202) 296-2597

FIGURE II-4: TYPICAL FORM LETTER USED BY CLEARINGHOUSES TO SOLICIT DOCUMENTS FROM NON-PROFIT ORGANIZATIONS CONCERNED WITH EDUCATION

reviewing the paper for possible inclusion in ERIC. (It should be made clear that announcement in a secondary abstract journal like RIE is not the equivalent of publication in a primary journal, but may nevertheless serve to preserve useful material.)

4. Tools for Use in Identifying Documents to Be Acquired

Clearinghouses utilize a number of reference tools, publications, and other sources to identify specific titles and potential contributors of documents. Such tools include:

- Conference and convention programs (e.g., APA Program);
- Journals newsletters, newspapers, advertisements, book reviews, and news items should be scanned regularly for relevant new titles and names of people or institutions engaged in projects, studies, or grant awards which could produce appropriate documents (e.g., *Education Daily*, *Chronicle of Higher Education*, and *Library Journal*).
- Bibliographies, publication lists, catalogs, acquisition lists, etc., can be excellent sources of new titles, and sometimes also provide ordering information (e.g., *GPO Monthly Catalog*, *UNESCO Publications*, *Checklist of Congressional Hearings*).
- Document reference lists, footnotes, etc. Documents already acquired can often, through their content, lead to other titles or other sources. References contained in Clearinghouse Information Analysis Products can often furnish valuable leads to new documents.
- Staff and client recommendations. Reference inquiries involving documents found not to be in the system should routinely be copied to the acquisitions unit.

Each subject area, and hence each Clearinghouse, has its own major reference tools. Clearinghouse personnel should take care to familiarize themselves with the specific reference tools that best fit their area of coverage and should see that they are represented in their reference collection.

5. Clearinghouse Acquisitions Operations (Typical)

Clearinghouse acquisitions operations differ from one another in procedural detail, forms and files used, recordkeeping, and in other respects. No matter how they are implemented, however, every Clearinghouse acquisitions operation is expected to observe the basic functional steps described below:

a. Using the relevant sources and tools, identify titles which appear to be desirable acquisitions within ERIC's scope. The acquisition of complimentary copies is always an objective, although items which cannot be obtained free of charge may be purchased, or the Clearinghouse may offer to exchange its newsletters, bibliographies, etc., for documents.

b. Once a title has been identified, check the *ERIC Acquisitions Arrangements* (EAA) list to ensure that the source organization is not covered by an acquisitions arrangement with another Clearinghouse or the Facility. If already covered, coordinate any subsequent contacts.

c. Check local "on-order" files and standard ERIC duplicate checking tools (such as the *Acquisitions Data Report* and the *Title Index*) to determine if the identified items have already been ordered, received, or processed.

d. If the item is from a Government agency or organization with which the Facility has an acquisitions arrangement (see EAA list), request a copy from the Facility. Titles may be requested by telephone or, preferably, by sending a Xerox copy of the citation. If it is more convenient, titles can be requested on standard 3 x 5 cards giving the complete bibliographic citation. Typical requests are shown in Figure II-5. The Facility will either obtain the document or let the Clearinghouse know if it is unavailable.

e. After following the above steps, request the documents, using a form letter, telephone call, or purchase order (whichever is more efficient). An example of a standard form letter is shown in Figure II-6. With each solicitation (unless ERIC has blanket reproduction permission), include a Reproduction Release form and all the bibliographic data available. Some Clearinghouses have found the enclosure of a self-addressed label with requests, and a self-addressed envelope with other correspondence, to be very useful in expediting responses.

f. Prepare an "on-order" record for Clearinghouse files; include title, author, source, price, and date ordered. Some Clearinghouses have found the simplest record to be a carbon copy of the solicitation.

g. As documents are received in the Clearinghouse, determine whether they are on order or have arrived unsolicited. Those on order should have receipt information entered on the on-order record, or the record should be purged, whichever in-house procedure dictates. Receipt of documents arriving unsolicited should be recorded and all useful correspondence and addresses should be preserved. (The use of the self-addressed label helps identify solicited items.)

Request from EA 1-23-80

Some School and Classroom Antecedents of Student Achievement.

Southwest Educational Development Laboratory
211 East 7th St.
Austin, TX 78701

Request from ERIC/CE 1/18/80

The Williams Report, 3 volumes.

Committee of Inquiry into Education and Training.

Government of Australia, Feb 1979.

TITLE: "Office of Education Resource Directory:

AUTHOR:

AGENCY: Office of Education Information Systems Section, Washington, D.C. 20202

CONTRACTOR:

PUBLICATION DATE:

ERIC/CRESS
Date Requested:
February 1, 1980

FIGURE II-5: TYPICAL REQUEST FOR A DOCUMENT SENT TO AN ORGANIZATION HAVING AN ACQUISITIONS ARRANGEMENT WITH THE FACILITY

# University of Illinois at Urbana-Champaign

College of Education
Institute for Child Behavior and Development
**EDUCATIONAL RESOURCES INFORMATION CENTER/**
**EARLY CHILDHOOD EDUCATION**

805 West Pennsylvania Avenue
Urbana, Illinois 61801
(217) 333-1386

Your report

is of interest to others in childhood development and early education. The ERIC Clearinghouse on Early Childhood Education would like to consider your paper for possible inclusion in the federally-funded ERIC information system. If you are interested, please send us two clearly typed or Xeroxed copies; an abstract would also be helpful. It is also necessary to complete and return the enclosed reproduction release along with the documents.

For details on submitting papers to ERIC, and for information on the ERIC system, please refer to the accompanying brochures. We also invite you to send other appropriate documents.

We hope to hear from you soon.

Sincerely,

Dianne Rothenberg
ERIC/ECE Acquisitions

DR/JM
Enclosures

FIGURE II-6: TYPICAL FORM LETTER USED BY CLEARINGHOUSES TO SOLICIT DOCUMENTS

h. Upon receipt of a document, acknowledgement of receipt of acceptance/rejection by card or letter is optional. Notifications to contributors vary considerably from Clearinghouse to Clearinghouse (see Figure II-7).

i. Check to see if a Reproduction Release form, or letter giving reproduction permission, accompanies the document. Resolve any copyright or reproduction release questions. (See Section II.8.) Retain all pertinent correspondence.

   If the document does not have a Reproduction Release form, and one is required, Clearinghouses have the following options:

   - Check the EAA List to see if ERIC has been given a Blanket Release;
   - Write for release (see Figure II-8). (It is advisable to write for releases only after a document has been selected for RIE. Writing prior to selection may result in needless work if the document is later rejected and may prematurely imply acceptance.);
   - Hold until after acceptance, then write for release.

j. Evaluate material using prescribed selection and legibility criteria (see Section III) and Clearinghouse Scope of Interest statement. Documents inappropriate for the system may be discarded after a suitable retention period that permits the Clearinghouse to respond to author and source inquiries or requests for return. Documents falling within the scope of other Clearinghouses should be transferred to them. (See Figure II-9 for ERIC Document Transfer Form.) Some Clearinghouses notify contributors when they transfer a document. (See Figure II-10.)

k. Prepare an entry for the *Acquisitions Data Report* (a composite report, prepared monthly by the Facility, reflecting the acquisitions of all Clearinghouses during the previous six month period). This step requires the Clearinghouse to formally accession the document and to assign a Clearinghouse Accession Number. (Instructions on how to prepare entries for this report are provided in Section IV.)

l. Record name and address of contributor (individual or organization) on mailing label, envelope, or form letter, for later use in distributing complimentary microfiche (provided by the Facility). (See Figure II-11.)

   NOTE: Complimentary microfiche should *not* be sent to the following kinds of organizations: Congress, Department of Education, Government Printing Office (GPO), large organizations when the specific name of an individual or department is unknown.

We are pleased to inform you that your document entitled:

_____

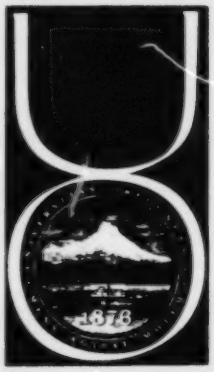
has been selected to be cited in the _____ issue of Resources in Education and has been assigned the document number: _____.

We actively solicit documents pertaining to higher education and we hope that you will encourage your colleagues to send us their papers and reports on any facet of higher education.

Sincerely,

ERIC Clearinghouse on Higher Education
The George Washington University

FIGURE II-7: TYPICAL EXAMPLE OF FORM USED BY CLEARINGHOUSES TO NOTIFY CONTRIBUTORS OF ACCEPTANCE OR REJECTION OF DOCUMENT



ERIC Clearinghouse on
Educational Managment
UNIVERSITY OF OREGON
Eugene, Oregon 97403

503/686-5043

The ERIC Clearinghouse on Educational Management has received copies of the document(s) listed on the enclosed form. It has been evaluated and we wish to include it in the ERIC index and abstract publication, *Resources in Education (RIE)*. However, the copyright revision law of January 1, 1978, requires a written release for every document reproduced and disseminated by ERIC. Please sign the enclosed release and return it to me at your earliest convenience.

Thank you for your cooperation and time in replying to this request. We will notify you when the resume appears in *RIE*. Please don't hesitate to send us any further research or research-related materials on educational management to consider for *RIE*.

Sincerely,

Clarice H. Watson

(Mrs.) Clarice H. Watson
Acquisitions Librarian

CHW:gh
Enclosures

☐ P.S. If this box is checked, please send us a second copy; it is needed for our files. Thank you.

*an equal opportunity/affirmative action employer*

FIGURE II-8: TYPICAL FORM LETTER USED BY CLEARINGHOUSES TO REQUEST COPYRIGHT RELEASE

**ERIC DOCUMENT TRANSFER FORM**

Date Received: _____ Date Transferred: _____

TO: ERIC/ _____

FROM: ERIC/ _____

The enclosed document(s) appear to be more within your scope than ours.

The document(s) were obtained by (check one):

___ solicited contribution
___ unsolicited contribution
___ staff contribution
___ ERIC Facility

Correspondence information is as follows: (check one):

___ all relevant material is attached
___ no relevant correspondence; however the name and address of the contributor or contact person is (if known):

_____
_____
_____

_____
Clearinghouse Contact Person

(EFF-70)

FIGURE II-9: ERIC DOCUMENT TRANSFER FORM

TRANSFER CARD TO AUTHOR

*We would like to inform you that your document entitled:*

_____

_____

*has been* TRANSFERRRED TO (CLEARINGHOUSE NAME AND ADDRESS)

_____

_____

_____

*Thank you for your contribution to the ERIC system. We hope that you will continue to send us your papers.*

*Sincerely,*

*ERIC Clearinghouse on Teacher Education*

FIGURE II-10: TYPICAL FORM USED BY CLEARINGHOUSES TO NOTIFY CONTRIBUTORS THAT THEIR DOCUMENT WAS TRANSFERRED TO ANOTHER CLEARINGHOUSE

# University of Illinois at Urbana-Champaign

College of Education
Institute for Child Behavior and Development
**EDUCATIONAL RESOURCES INFORMATION CENTER/**
**EARLY CHILDHOOD EDUCATION**

805 West Pennsylvania Avenue
Urbana, Illinois 61801
(217) 333-1386

Re:

We are pleased to inform you that an abstract of the document(s) cited above is included in the _____ issue of Resources in Education (RIE), ERIC's monthly abstract journal. The document number assigned to it is ED _____.

Enclosed is a copy of the document resume and a microfiche copy of the document which you may keep for your files.

Thank you for making this work available to us.

Sincerely,

Dianne Rothenberg
ERIC/ECE Acquisitions

DR/jms

FIGURE II-11: TYPICAL FORM LETTER USED BY CLEARINGHOUSES TO SEND CONTRIBUTOR A COPY OF RESUME AND MICROFICHE COPY OF ACCEPTED DOCUMENT

All automatic acquisition arrangements should establish whether and to whom complimentary microfiche should be distributed. When more than one Clearinghouse processes documents from a given organization, it is desirable that complimentary microfiche be distributed in a uniform manner in order to eliminate confusion in the mind of the contributor.

m. Sending rejection notices is optional, unless specifically requested by the contributor. Clearinghouses vary in the methods used to notify contributors of rejected documents. Some use the standard ERIC "Reply Card." Some use their own forms, providing for a variety of messages. An example is shown in Figure II-12.

After all the above steps are completed and the document is determined to be suitable for RIE, legible, not a duplicate, cleared by the Government Project Officer (where appropriate), without any unresolved reproduction release problems, and mailing information for complimentary microfiche has been prepared, acquisitions formally comes to an end and the document is ready for the cataloging/indexing/abstracting process. Because of the expense of the various intellectual document analysis functions, the acquisitions function must make every effort to eliminate duplicates before that stage of processing is reached. (See Section IV for discussion of duplicate checking process.)

6. Department of Education Documents

a. NIE

All reports sponsored by NIE must be approved/accepted/cleared by NIE before being processed. Normally, Clearinghouses receive such reports from the Facility and it can be assumed that such reports have been approved and may be processed. Any NIE contract/grant reports received from other sources must be cleared through the Facility before they can be processed. This clearance is best obtained by sending a copy of the title page or bibliographic citation to the Acquisitions Librarian at the Facility. The Facility then does the following:

- Records the fact that the Clearinghouse has reported receiving the NIE report and checks to determine if the report has already been acquired;
- Informs the Clearinghouse if the report is a duplicate;
- If the report is new to ERIC, asks Central ERIC to check whether the report has been approved by the Project Officer;
- Informs the Clearinghouse, usually within two weeks, whether to proceed with processing or not. Clearinghouses must continue to hold the document until notified of clearance by Central ERIC (or the Facility).

ERIC® ERIC CLEARINGHOUSE ON TESTS, MEASUREMENT, & EVALUATION
EDUCATIONAL TESTING SERVICE, PRINCETON, NEW JERSEY 08541

Thank you for submitting your document for possible inclusion in the ERIC system. While we recognize the thought, time, and energy that have been devoted to the preparation of this document, we are unable to announce it in Resources in Education and make it available through the ERIC Document Reproduction Service.

The ERIC/TM Clearinghouse receives hundreds of documents each year. Given budgetary limitations and other constraints, we are only able to process a third of the items we receive.

We do hope that you will continue to submit documents for possible inclusion in the ERIC system. Meanwhile, if you have any questions about your document or about ERIC, we will be happy to answer them.

Sincerely yours,

Carol Paskowsky
Acquisitions Coordinator

CP:sf

TELEPHONE: 609-921-9000

FIGURE II-12: TYPICAL FORM LETTER USED BY CLEARINGHOUSES TO NOTIFY CONTRIBUTORS OF NON-ACCEPTANCE OF DOCUMENT

However, in the case of documents from the NIE-funded educational laboratories and R&D centers, if no negative feedback is received from Central ERIC or the Facility within two weeks, the documents may be processed.

b. Other Department of Education Divisions

All reports sponsored by other Department of Education Divisions must also be approved/accepted/cleared before being processed. Reports received directly from the Facility can be assumed to be approved. In the case of reports received through other channels, copies of the title pages should be sent to the Facility. The checking procedure is the same as that for NIE reports. If, after two weeks, Central ERIC or the Facility has not notified the Clearinghouse to the contrary, Clearinghouses can assume there is no objection to processing the report and can proceed accordingly.

7. Documents Received From the Facility

a. Standard Reply Cards

Reply cards (see Figure II-13) attached to documents received from the Facility require an ED accession number and should, therefore, be detached and returned to the contributor *only when they are not selected.* If selected for RIE, the card remains on the document and is shipped back to the Facility for processing and affixing of the ED number.

b. Special Reply Cards

Special Reply Cards (NDN, SEA) (see Figures II-14(A) and (B)) attached to documents received from the Facility should be detached and returned to contributors as soon as a disposition of the document has been made.

c. PRIORITY Documents

Documents received from the Facility which indicate PRIORITY handling should be evaluated immediately upon receipt. Acceptance requires expedited processing to ensure announcement of the document in the next issue of RIE to be released. Should a PRIORITY document be rejected, Central ERIC must be notified immediately.

d. NIE Document Selection Report

All NIE documents received from the Facility and not selected for RIE must be returned to the Facility and the reason given for their rejection. The NIE Document Selection Report form (see Figure II-15) should be used for this purpose. NIE reports which are not accepted for inclusion in the ERIC system will be retained in the permanent NIE Library collection.

**ERIC REPLY CARD**

**DOCUMENT TITLE:** _____

_____

**DISPOSITION OF DOCUMENT:**

Selected for the _____ issue of RIE and

☐ is assigned document no. _____

☐ Not selected for RIE.

_____

_____

**CLEARINGHOUSE NAME:** _____

Date: _____

*HAVE YOU ENTERED YOUR CORRECT RETURN ADDRESS ON THE FRONT OF THIS CARD?*

EFF-28 (7-79)

FIGURE II-13: ERIC REPLY CARD

Submitting State Education Agency

REPLY CARD

Document Title: _____

_____

Clearinghouse Temporary Accession # : _____

SEA *Check One:* ☐ Reproduction Release Enclosed
☐ ERIC has Blanket Reproduction Release on File

*Check One:* If not selected: ☐ Return ☐ Do Not Return

*(Please do not ask for return unless absolutely necessary.)*

ERIC Disposition of Document

☐ Selected for RIE. Resume will appear in RIE in about 4 months. Copies cannot be ordered from EDRS before announcement in RIE.

☐ Not selected for RIE.

COMMENTS: _____

Clearinghouse Name: _____ Date: _____

*HAVE YOU ENTERED YOUR CORRECT RETURN ADDRESS ON THE FRONT OF THIS CARD?*

EFF-64 (5/79)

FIGURE II-14(A): ERIC REPLY CARD USED FOR NOTIFYING STATE EDUCATION AGENCIES OF DOCUMENT DISPOSITION

**ERIC REPLY CARD**

**NDN Document Submission**

Project Name: _____

Document Title: _____

_____

Please check one: Reproduction Release enclosed ☐
ERIC has Blanket Reproduction Release on file ☐

Date submitted to ERIC: _____

**ERIC Disposition of Document**

☐ Selected for RIE.
Resume will appear in RIE in about 3 months. Copies cannot be ordered from EDRS before announcement in RIE.

☐ Not selected for RIE.

Clearinghouse Name: _____

Date reported to submitter: _____

*HAVE YOU ENTERED YOUR CORRECT RETURN ADDRESS ON THE FRONT OF THIS CARD?*
*THANK YOU FOR SUBMITTING YOUR DOCUMENT TO ERIC*

EFF-59 (10/78)

FIGURE II-14(B): ERIC REPLY CARD USED FOR NOTIFYING NATIONAL DISSEMINATION NETWORKS OF DOCUMENT DISPOSITION

NIE DOCUMENT

SELECTION REPORT

FROM : _____ / _____
(Clearinghouse) (Individual)

TO : ERIC Facility Acquisitions Department

SUBJECT : Return of NIE Document or NIE-Sponsored Report Not Meeting Clearinghouse Selection Criteria

REFERENCE: _____
(Title of Document)

☐ Document will not microfilm or reproduce adequately

☐ Document has been/will be published as a journal article

☐ Quality of content is not acceptable

☐ Other _____

☐ Comments: _____

_____

_____

Enclosure

EFF-71 (4/80)

FIGURE II-15: NIE DOCUMENT SELECTION REPORT

e. Scope Overlap Notices

In order to prevent duplicate processing, a Clearinghouse which receives a Xerox copy of a cover or title page with a "Scope Overlap Sticker" from the Facility should check its records to see if the document is on order, in-process, or otherwise being considered for acquisitioning.

8. Copyright and Reproduction Release

The Copyright Revision Law (PL-94-553), effective January 1, 1978, requires ERIC to assume that all private sector documents, whether carrying a copyright notice or not, are copyrighted, unless such documents were published without a copyright notice prior to January 1, 1978. For this reason, unless ERIC already has blanket reproduction permission from the source organization, a signed reproduction release form must be obtained for every title selected for the ERIC system. The existence of a letter of transmittal giving ERIC permission to reproduce the report is not sufficient.

ERIC has designed two standard reproduction release forms for systemwide use——one for individual documents (see Figure II-16) and one for blanket permissions (see Figure II-17). Clearinghouses are encouraged to develop their own form letters (for examples see Figure II-18) to send to contributors along with the release forms, explaining and introducing the form and making it clear that it should be returned to the Clearinghouse with the document. The Blanket Reproduction Release should be negotiated whenever possible in order to eliminate as many individual release forms as possible, thereby saving both effort and time. Clearinghouses obtaining blanket releases should report them for listing in the annual *ERIC Acquisitions Arrangements* (EAA) list. The responsibility for maintaining a permanent file of Reproduction Releases, and for ensuring the accuracy of copyright information on the processed documents, rests with the Clearinghouses.

Many questions arise concerning copyright and reproduction release matters. The following points speak to the most common problems. For problems not covered below, contact Central ERIC.

a. Public Domain

A document issued without a copyright notice may be registered by the author prior to or within a five-year period after the date of public distribution. If the work is not registered within this period, then the document is considered to be in the public domain.

**U.S. DEPARTMENT OF EDUCATION**

**NATIONAL INSTITUTE OF EDUCATION**

**EDUCATIONAL RESOURCES INFORMATION CENTER (ERIC)**

**REPRODUCTION RELEASE** (Specific Document)

I. **DOCUMENT IDENTIFICATION**

Title: _____

_____ Date: _____

Author(s): _____

Corporate Source (if appropriate): _____

_____

II. **REPRODUCTION RELEASE**

In order to disseminate as widely as possible timely and significant materials of interest to the educational community, documents announced in the monthly abstract journal of the ERIC system, Resources in Education (RIE), are usually made available to users in microfiche and paper copy (or microfiche only) and sold through the ERIC Document Reproduction Service (EDRS). Credit is given to the source of each document, and, if reproduction release is granted, one of the following notices is affixed to the document.

If permission is granted to reproduce the identified document, please CHECK ONE of the options and sign the release below.

CHECK HERE ➧ ☐ Microfiche (4" x 6" film) and paper copy (8½" x 11") reproduction

"PERMISSION TO REPRODUCE THIS MATERIAL HAS BEEN GRANTED BY

(PERSONAL NAME OR ORGANIZATION AS APPROPRIATE)

TO THE EDUCATIONAL RESOURCES INFORMATION CENTER (ERIC)."

OR ☐ Microfiche (4" x 6" film) reproduction only

"PERMISSION TO REPRODUCE THIS MATERIAL IN MICROFICHE ONLY HAS BEEN GRANTED BY

(PERSONAL NAME OR ORGANIZATION AS APPROPRIATE)

TO THE EDUCATIONAL RESOURCES INFORMATION CENTER (ERIC)."

Documents will be processed as indicated provided reproduction quality permits. If permission to reproduce is granted, but neither box is checked, documents will be processed in both microfiche and paper copy.

SIGN HERE ➧

"I hereby grant to the Educational Resources Information Center (ERIC) permission to reproduce this document as indicated above. Reproduction by persons other than ERIC employees and its system contractors requires permission from the copyright holder. Exception is made for non-profit reproduction of microfiche by libraries and other service agencies to satisfy information needs of educators in response to discrete inquiries."

Signature: _____ Printed Name: _____

Organization: _____

Position: _____

Address: _____ Tel. No.: _____

Zip Code: _____

III. **DOCUMENT AVAILABILITY INFORMATION** (Non-ERIC Source)

If permission to reproduce is not granted to ERIC, or, if you wish ERIC to cite the availability of the document from another source, please provide the following information regarding the availability of the document. (ERIC will not announce a document unless it is publicly available, and a dependable source can be specified. Contributors should also be aware that ERIC selection criteria are significantly more stringent for documents which cannot be made available through EDRS.)

Publisher/Distributor: _____

Address: _____

_____

Price Per Copy: _____ Quantity Price: _____

_____

IV. **REFERRAL TO COPYRIGHT/REPRODUCTION RIGHTS HOLDER**

If the right to grant reproduction release is held by someone other than the addressee, please provide the appropriate name and address:

_____

_____

EFF-53 (Rev. 8/80)
GPO 872 060

FIGURE II-16: ERIC REPRODUCTION RELEASE (SPECIFIC DOCUMENT)

**U.S. DEPARTMENT OF EDUCATION**

**NATIONAL INSTITUTE OF EDUCATION**

**EDUCATIONAL RESOURCES INFORMATION CENTER (ERIC)**

**REPRODUCTION RELEASE** (Blanket)

I. **DOCUMENT IDENTIFICATION** (Class of Documents)

All publications: _____
Series (Identify Series): _____
Division/Department Publications (Specify): _____

II. **REPRODUCTION RELEASE**

In order to disseminate as widely as possible timely and significant materials of interest to the educational community, documents announced in the monthly abstract journal of the ERIC system, Resources in Education (RIE), are usually made available to users in microfiche and paper copy (or microfiche only) and sold through the ERIC Document Reproduction Service (EDRS). To reduce the number of individual requests that must be made for reproduction release, ERIC attempts where feasible to obtain a blanket release for all documents submitted by an organization. Credit is given to the source of each document, and, if reproduction release is granted, one of the following notices is affixed to the document.

If permission is granted to reproduce the above class of documents please CHECK ONE of the options and sign the release below.

CHECK HERE ◇

☐ Microfiche (4" x 6" film) and paper copy (8½" x 11") reproduction

"PERMISSION TO REPRODUCE THIS MATERIAL HAS BEEN GRANTED BY

(PERSONAL NAME OR ORGANIZATION AS APPROPRIATE)

TO THE EDUCATIONAL RESOURCES INFORMATION CENTER (ERIC)."

OR ☐ Microfiche (4" x 6" film) reproduction only

"PERMISSION TO REPRODUCE THIS MATERIAL IN MICROFICHE ONLY HAS BEEN GRANTED BY

(PERSONAL NAME OR ORGANIZATION AS APPROPRIATE)

TO THE EDUCATIONAL RESOURCES INFORMATION CENTER (ERIC)."

Documents will be processed as indicated provided reproduction quality permits. If permission to reproduce is granted, but neither box is checked, documents will be processed in both microfiche and paper copy.

SIGN HERE ◇

"I hereby grant to the Educational Resources Information Center (ERIC) permission to reproduce the Class of Documents indicated above. Reproduction by persons other than ERIC employees and its system contractors requires permission from the copyright holder. Exception is made for non-profit reproduction of microfiche by libraries and other service agencies to satisfy information needs of educators in response to discrete inquiries."

Signature: _____ Printed Name: _____
Organization: _____
_____ Position: _____
Address: _____ Tel. No.: _____
_____ Zip Code: _____

III. **DOCUMENT AVAILABILITY INFORMATION** (Non-ERIC Source)

If permission to reproduce is not granted to ERIC, or, if you wish ERIC to cite the availability of the document from another source, please provide the following information regarding the availability of the document. (ERIC will not announce a document unless it is publicly available, and a dependable source can be specified. Contributors should also be aware that ERIC selection criteria are significantly more stringent for documents which cannot be made available through EDRS.)

Publisher/Distributor: _____
Address: _____
_____
Price Per Copy: _____ Quantity Price: _____

IV. **REFERRAL TO COPYRIGHT/REPRODUCTION RIGHTS HOLDER**

If the right to grant reproduction release is held by someone other than the addressee, please provide the appropriate name and address:

_____
_____

EFF-57 (Rev. 9/80)

FIGURE II-17: ERIC REPRODUCTION RELEASE (BLANKET)

ERIC EDUCATIONAL RESOURCES INFORMATION CENTER

*Clearinghouse on Higher Education*

THE GEORGE WASHINGTON UNIVERSITY

The Clearinghouse on Higher Education is pleased to notify you that the publication your organization sent to be considered for announcement in Resources in Education has been accepted. However, even though the document does not contain a copyright notice, we do need to have you sign the enclosed Request for Reproduction Release. The need for this release is a result of the new copyright law effective January 1, 1978. As you may know, the new law states that any document issued without a copyright notice may still be registered by the author or organization within a five-year period from date of public distribution. Therefore, it is an ERIC system policy that we must receive a copyright release before any document can be announced in Resources in Education and made available in microfiche or hardcopy form.

As an alternative to this individual release, you may indicate that you will grant us a blanket release. By signing a blanket release you are granting permission to ERIC to automatically include in the system this and all future publications that you send to us. This would eliminate delay in processing your material. If this agreement is acceptable, please just sign the enclosed Blanket Reproduction Release form.

Your response to this matter will be greatly appreciated. Please send the completed form to the Clearinghouse address, not to NIE.

Thank you for submitting material to the ERIC system. I look forward to receiving reports from you and your organization in the future.

Sincerely,

Marilyn Scutt Shorr
Assistant Director

Enclosure

SUITE 630 / ONE DUPONT CIRCLE / WASHINGTON, D. C. 20036 / (202) 296-2597

FIGURE II-18: TYPICAL LETTER SENT TO CONTRIBUTORS BY CLEARINGHOUSES TO INFORM THEM OF DOCUMENT ACCEPTANCE AND TO REQUEST A REPRODUCTION RELEASE

b. Announcement Without Reproduction

It is considered legally permissible to abstract (at the length provided for by ERIC guidelines) and to announce copyrighted documents at Level 3, whether or not a reproduction release has been obtained. Announcement alone does not violate copyright. However, ERIC does not announce any document unless users can be referred to a source of availability.

c. Multiple Authors

If a document having multiple authors requires a release form, a signed release from any one of the authors is considered sufficient.

d. GPO and NTIS Documents

Documents printed by GPO or NTIS, which do not carry a copyright notice, do not require a copyright release. They are assumed to have been generated with Federal government funding under terms which either place them in the public domain or else reserve a free right of reproduction for U.S. Government purposes.

e. Speeches

Speeches written and/or delivered in the author's private capacity require a release. Speeches written by an employee of the Federal Government, operating in an official capacity, do not require a release. Speeches written by a Federal employee, and bearing a copyright notice, must be checked with Central ERIC.

f. State Documents

State funded documents, whether bearing a copyright notice or not, require a release form.

g. International Foreign Copyright

Copyright under the Universal Copyright Convention is indicated by the © symbol. However, since there are numerous other bilateral and multilateral agreements between countries affecting the copyright picture, it is advisable to handle foreign documents the same as domestic documents as far as permissions and releases are concerned. In other words, the presence or absence of the © symbol should not affect the decision to seek a release.

h. Journal Article Publication

Documents generated with Federal Government funding are in the public domain. Such documents may later be published as

journal articles, but will often carry a notice (e.g., a footnote) reserving the Government's right to reproduce and/or excluding them from the overall journal issue copyright.

i. Federally Funded Documents (Including Contractor Reports)

Federally funded documents fall under the copyright law just as do private sector documents. The difference is that the Government reserves the right to reproduce for its own purposes all Federally funded documents. Reproduction by ERIC is considered "for Government purposes." This includes, for example, the federally funded but copyrighted documents of states, local governments, and school districts. It also includes the instances where a Government agency has granted a contractor the right to copyright a given document for a limited period of time (perhaps to facilitate dissemination objectives).

It is therefore possible to construct the following decision matrix:

| | No Copyright Notice | Copyright Notice |
|---|---|---|
| Federally Funded | No Release Necessary | Check with Central ERIC |
| Not Federally Funded | Release Necessary | Release Necessary |

As can be seen, Federal documents bearing a copyright notice should be checked with Central ERIC to determine whether a release is necessary. If in doubt, or if some questionable variation of this situation occurs, Central ERIC should also be contacted.

j. Letter in Lieu of Release

At the present time, a letter giving ERIC permission to reproduce an accompanying document is not sufficient no matter how explicit the letter may be. ERIC policy is that a *Reproduction Release (Blanket)* or a *Reproduction Release (Specific Document)* must be obtained to cover every document that is not federally prepared or federally supported.

k. Copyrighted Segments of a Document

Some documents contain segments copyrighted by someone other than the producer of the document. The document may be left intact if:

- ERIC has permission from the segment's copyright holder; or

- the segment is small in relation to the overall work from which it is taken, so that its reproduction would be allowable under the copyright law's "fair use"; or

- the original permission obtained from the segment author by the producer of the document in hand (containing the segment) is broadly stated (i.e., not restricted to one publisher) and can be assumed to extend to all printings, reprintings, and other forms of the document in hand, including its duplication in ERIC.

In general, documents should be left intact whenever possible, for the benefit of the user.

9. Non-U.S. Documents

Documents not available from sources in the United States, including documents in non-English languages, may be acquired and selected for ERIC, but must meet more stringent criteria for quality and availability/reproducibility. In addition, it is highly recommended that non-English language documents should, if at all possible, be accompanied by a 1,000-1,500 word summary in English for the benefit of searchers not proficient in the language of the text.

The acquisitions/selection criteria, and other policies and guidelines pertaining to foreign documents, have been formalized by a special ERIC committee and are provided here verbatim (see Figure II-19).

10. Recordkeeping

Acquisitions statistics are used primarily to facilitate the acquisitions effort and to permit Clearinghouses to identify organizations, conferences, authors, and other sources, which are prime sources of documents. While recordkeeping practices vary from Clearinghouse to Clearinghouse, all should be evaluated and justified in terms of their utility and effectiveness in helping to bring documents into the system.

The following categories of information or statistics, kept for this purpose, have been reported by Clearinghouses:

- Types of contributors;

- Types of documents received;

- Subject areas of documents received;

- Documents requested via the Facility;

- Documents arriving with reproduction releases;

## FOREIGN DOCUMENTS

### Policies and Guidelines for Acquiring and Selecting Foreign Documents for the ERIC System

### 1. PURPOSE

To assist Clearinghouses in acquiring and selecting foreign documents; and to assist foreign nationals, international organizations, intergovernmental agencies, foreign ministries of education, and other foreign government agencies in submitting documents to ERIC.

**Rationale:**

Acquisition of foreign documents is a cooperative venture between the Facility and the Clearinghouses. The Facility maintains agreements with foreign ministries of education and international organizations on behalf of the ERIC system. Selection is a Clearinghouse function. These policies and guidelines, together with those in the *ERIC Processing Manual*, should help to establish some consistency of foreign document input.

### 2. DEFINITION OF FOREIGN DOCUMENTS

Foreign documents are publications which are produced in a foreign country or by an international agency. Foreign documents may or may not be in a foreign language.

**Rationale:**

This definition is an attempt to differentiate between a foreign document and a foreign language document. Some foreign language documents are produced in the U.S. There are many foreign documents in English. The new GEO, GOVE, and LANG data elements will help to promote acceptance of this definition.

### 3. LANGUAGE OF THE TEXT

When a document is not in English (whether it is foreign or domestic), it should ideally be accompanied by a 1,000-1,500 word summary in English.

**Rationale:**

ERIC is an English language information system. In order to better serve the user population, a more complete summary of documents in foreign languages should be provided than that available in a 200 word abstract. Therefore, a 1,000-1,500 word English summary, prepared by the individual or organization submitting the document, should accompany each foreign document as an integral part of that document. A 1,000 word summary is often adequate to characterize the essential content of shorter documents received from foreign sources. Exceptions to the requirement of an English-language summary may be made when the potential users of the document are expected to be familiar with the language of the document; this would apply particularly to users of documents submitted by the Language and Linguistics Clearinghouse.

### 4. QUALITY OF CONTENT

Foreign documents should meet higher quality criteria than those applied to domestic documents. Each Clearinghouse is encouraged to review its unique acquisition policies in regard to foreign documents and to develop its own priorities and special guidelines.

**Rationale:**

For there to be as little criticism as possible in regard to the inclusion of foreign documents, the significance and quality of foreign documents should be well above the level considered to be necessary for domestic documents.

### 5. TECHNICAL REQUIREMENTS (PERTAINING TO REPRODUCIBILITY)

All foreign documents should meet the technical standards required of all domestic documents. Such standards are concerned with reproducibility, legibility, physical quality, and page size. The *ERIC Document Reproducibility Guidelines* should be followed.

**Rationale:**

There is no reason to vary technical physical standards from those currently in force.

### 6. TYPES OF DOCUMENTS

Documents to be considered from foreign sources will be the same as those considered from domestic sources, except for the following types which are not encouraged for submission: resource guides, legislation and regulations, brochures, and pamphlets. There will be exceptions, but as a general rule those items which are easily dated, of highly specific local use, and which list resources generally available only in a foreign country, should receive lower priorities.

**Rationale:**

Each Clearinghouse will ultimately make its own selection decision, but as a general guideline there are certain documents, such as those mentioned above, which appear to be of lower priority than others.

### 7. LEVEL 3 DOCUMENTS

In general, Level 3 selections are not an option. Levels 1 and 2 should be thoroughly explained to foreign contributors. The Level 3 option should never be used unless a reliable source of copies can be identified.

**Rationale:**

Foreign Level 3 documents should be discouraged even more than domestic Level 3s. One way to do this is not to describe the option. However, there are rare times when foreign Level 3 documents should be included. This policy permits limited inclusion, but strongly discourages solicitation of such documents.

FIGURE II-19: FOREIGN DOCUMENTS

- Productivity of second request follow-up efforts;
- Solicitations returned due to incorrect address;
- Reasons for rejection of documents;
- Number of returns for each conference solicited;
- Reproducible documents received (versus non-reproducible receipts)
- Organizations tending to submit acceptable documents (versus those submitting rejected documents);
- Organizations submitting documents on the basis of agreement (or periodically). Periodic reminders or follow-ups to those organizations are necessary.

Clearinghouses gather information both manually, and in some cases, by computer. Examples of some typical Clearinghouse recordkeeping forms are seen in Figures II-20 & 21.

11. Reporting to Central ERIC

The following statistics for Clearinghouse acquisitions efforts are required by Central ERIC to be reported on a quarterly basis and at the annual review:

- Total documents acquired;
- Total solicitations;
- Number of acquired documents solicited;
- Number of acquired documents unsolicited;
- Number of documents selected for RIE;
- Number of documents selected for local files;
- Number of documents rejected;
- Number of documents transferred (to other Clearinghouses).

For more detail on reporting requirements, see Section 7.3 of the *ERIC Administrative Procedures Manual*.

F. ERIC Facility Acquisitions Program

1. Scope and Purpose

The ERIC Facility Acquisitions Program was initiated for the following reasons:

- to increase the flow of documents to the Clearinghouses from certain sectors (Federal, State, and International);
- to build a foundation of automatic acquisition/ distribution arrangements;

DOCUMENT TIME DATA

IR_____

| Activity | Initials/Date | Time | Comments |
|---|---|---|---|
| Thank You Notice Sent | | | |
| Duplicate Checking | | | |
| Faculty Evaluation | | | |
| Document Preparation | | | |
| ADR | | | |
| Cataloging | | | |
| Control Card | | | |
| Reading/Scan | | | |
| Indexing | | | |
| Abstracting | | | |
| Informative [ ] | | | |
| Indicative [ ] | | | |
| Mixed [ ] | | | |
| Typing | | | |
| Indexing Check | | | |
| Editing 1 | | | |
| 2 | | | |
| OCR Keying | | | |
| OCR Proofing | | | |

FIGURE II-20: TYPICAL EXAMPLE OF A CLEARINGHOUSE RECORDKEEPING FORM (EXAMPLE 1)

ERIC/TM DOCUMENT CONTROL FORM

___ Cardfile

___ ADR _____Month

___ 79 Title Index

___ 77-78

___ 66-76

___ Related Documents

SELECTION

ACCEPT _____/_____ PRIORITY ___A ___B ___C ___RUSH

NEED SECOND OPINION _____/_____

TRANSFER _____/_____ TO _____ RETURN REQUESTED ___ YES ___ NO

REJECT _____/_____ Specify reason - see reverse side.

COMMENTS

SCREENING

LEGIBILITY CHECK _____TEXT _____ APPENDICES _____/_____

PHOTOCOPY _____/_____

| HOLD--REQUEST: | BETTER COPY RELEASE | 2nd COPY | SUPPLEMENTAL MATERIAL | OTHER |
|---|---|---|---|---|
| letter sent | | | | |
| followup | | | | |
| received | | | | |

READY TO PROCESS: AT LEVEL _____ DATE SHIPPED _____

AUTHORITY: _____ repro rel _____ acq argmt _____ cover letter _____other

FIGURE II-21: TYPICAL EXAMPLE OF A CLEARINGHOUSE RECORDKEEPING FORM (EXAMPLE 2 - PAGE 1 of 2)

ERIC / TM SELECTION GUIDELINES

| DATE | INITIALS | | |
|---|---|---|---|
| _____ | _____ | 1. | Duplicate to _____ |
| _____ | _____ | 2. | Not within scope of RIE. Little or no applicability to education. |
| _____ | _____ | 3. | Format inappropriate: |
| | | | _____ journal article |
| | | | _____ dissertation without Level I or II release |
| | | | _____ newsletter |
| | | | _____ commercial test materials with no release |
| | | | _____ book available from major publisher |
| | | | _____ promotional materials |
| | | | _____ other: explain |
| _____ | _____ | 4. | Will be published as a journal article. Cite if known. |
| _____ | _____ | 5. | Submitted to journal. Publication decision pending. Cite if known. |
| _____ | _____ | 6. | Too old (written 5 or more years ago and is not a landmark document. |
| _____ | _____ | 7. | Too short - less than 6 pages. If substantive, permission of monitor required to input. |
| _____ | _____ | 8. | Additional documentation required. |
| _____ | _____ | 9. | Is not substantive. Does not add to the data base. |
| _____ | _____ | 10. | Information already in data base. |
| _____ | _____ | 11. | Document poorly prepared - incomplete, garbled, not outlined, etc. |
| _____ | _____ | 12. | Major problems in study design, poor quality. |
| _____ | _____ | 13. | Of local interest only. |
| _____ | _____ | 14. | No reply to letter requesting resolution of problems. |

COMMENTS:

FIGURE II-21: TYPICAL EXAMPLE OF A CLEARINGHOUSE RECORDKEEPING FORM (EXAMPLE 2 - PAGE 2 of 2)

- to serve as an expediter for the complex area of Federal Government documents (where being in the Washington area is important);

- to coordinate network acquisition efforts and help avoid redundancy and confusion (e.g., by such means as the maintenance of the *ERIC Acquisitions Arrangements* list);

- to eliminate multiple soliciations by various network components to one Government agency, State Department of Education, or other organization dealing broadly with the field of education.

Facility efforts are concentrated in the following areas:

- Federal Agencies;

- State Departments of Education;

- Foreign Ministries of Education;

- International and Intergovernmental Organizations;

- Professional Associations or other entities covering education broadly (e.g., NEA).

In addition, certain organizations, on their own initiative, have approached the Facility for liaison in the acquisitions area.

The Facility makes arrangements with the NIE-sponsored educational laboratories and research and development centers to receive directly all of their reports which are approved for public dissemination. In addition, the Facility receives all Department of Education input from Central ERIC and all unsolicited input arriving at Central ERIC or EDRS. All such documents are assigned to appropriate Clearinghouses for processing. The Facility maintains the *ERIC Clearinghouse Scope of Interest Manual* (see Appendix A) on the basis of information received from the Clearinghouses.

The Facility functions in direct support of the Clearinghouses by obtaining for them centrally the documents of organizations whose programs cover the entire spectrum of education. The Facility also functions in many respects as an agent of Central ERIC. It receives direct requests for action from Central ERIC involving both automatic arrangements and specific documents. It works closely with Central ERIC in an effort to see that all Department of Education internal reports are obtained for the system. Visits to Government agencies to establish arrangements are often made by Central ERIC and Facility staff working together. Special acquisition projects are often assigned to the Facility by Central ERIC.

Facility acquisitions are intended to augment and supplement the main ERIC acquisitions effort, which resides at the Clearinghouses.

2. Sources of Documents

a. Central ERIC

All Department of Education and unsolicited documents acquired by Central ERIC are delivered to the Facility by daily courier for recording and assignment to Clearinghouses. The Facility is frequently asked by Central ERIC to report on the receipt or status of particular documents and to expedite PRIORITY documents. The Facility requests certain Department of Education documents from Central ERIC by title. The Facility refers all policy questions concerning copyright or reproduction release to Central ERIC. Central ERIC refers organizations and individuals to the Facility for follow-up acquisitions contacts. In some cases, arrangements are initiated by Central ERIC and completed by the Facility. Before contacting State Departments of Education or foreign ministries of education, the Facility first obtains Central ERIC approval.

b. Automatic Distribution Arrangements

(1) ERIC Facility Acquisitions Arrangements (EFAA's)

The Facility maintains an on-going effort to contact education-related organizations in its area of responsibility in order to enter into agreements with them to receive relevant publications on a regular basis and to secure Blanket Reproduction Releases, where appropriate. After determining that an organization is willing to cooperate, details are worked out and the following steps are taken:

- a signed release form (if necessary) is obtained;
- Reply Cards are offered; and
- informational ERIC materials are sent to the new contributor.

When documents begin arriving:

- the organization is given a number and listed as an EFAA and
- a copy of all documentation is submitted to Central ERIC.

All EFAA's are listed numerically in the periodic EFAA List (see Figure II-22). Organizations whose acquisitions arrangements are inactive are identified on the list by an asterisk. Arrangements become inactive for a variety of reasons: defunct, publication discontinued, loss of contact, etc. Therefore, EFAA's are continuously monitored to determine whether publications are still being received. Notification of new EFAA arrangements or changes in established arrangements are announced each month in the *ERIC Administrative Bulletin*.

(2) Exchange Arrangements

In order to establish acquisitions arrangements with certain large international organizations and foreign ministries of education, the Facility is authorized, subject to Central ERIC approval, to offer a one year complimentary subscription to RIE in exchange for the organization's publications. This type of arrangement is closely monitored to ensure that ERIC receives a commensurate number of appropriate documents.

(3) Standing Orders

In certain cases, the Facility enters into standing order arrangements in order to obtain desired publications not available in other ways. The principal current example is the standing order with UNIPUB to obtain education-related UNESCO sales publications for Level 3 announcement in RIE.

c. Specific Requests

Many organizations do not maintain distribution lists or do not produce enough documents of interest to ERIC to warrant establishing an acquisitions arrangement. Documents from organizations for this type must be acquired on a title-by-title basis. For this purpose, the Facility employs form letters, free copies of ERIC publications, and generally includes a request for Reproduction Release.

Requests for specific titles are generated either by requests from the Clearinghouses or by scanning the serial publications, newsletters, and brochures of organizations within the Facility's scope.

(1) Clearinghouse Requests

Clearinghouses are requested to ask the Facility for documents they wish to obtain from any organization with which the Facility has an existing arrangement, or from any branch of the Federal Government. The Facility

# ERIC FACILITY ACQUISITIONS ARRANGEMENTS

| EFAA NUMBER | CONTRIBUTING INSTITUTION | PRESCRIBED LEVEL OF INPUT |
|---|---|---|
| 1* | National Institutes of Health | 1 |
| 2* | Library of Congress, Exchange and Gift Division | 1 |
| 3 | District of Columbia Public Schools | 1 |
| 4 | Library of Congress, Division for the Blind and Handicapped | 1 |
| 5 | General Accounting Office | 1 |
| 6 | Employment and Training Administration (DOL) | 1 |
| 7 | Administration on Aging | 1 |
| 8* | Department of Labor: Child Labor Division | 1 |
| 9 | Bureau of Labor Statistics (DOL) | 1 |
| 10 | Women's Bureau (DOL) | 1 |
| 11 | President's Committee on Mental Retardation | 1 |
| 12* | Senate Select Committee on Equal Educational Opportunity | 1 |
| 13 | National Institute on Drug Abuse, National Clearinghouse for Drug Abuse Information | 1 |
| 14* | National Park Service: Office of Environmental Interpretation | 1 |
| 15 | Consumer Services Administration (CSA) | 1 |
| 16* | White House Conference on Aging | 1 |
| 17* | National Endowment for the Humanities | 1 |
| 18* | President's Commission on School Finance | 1 |
| 19* | Regional Economic Coordination Council | 1 |
| 20* | Office of Child Development, Child Care Program | 1 |
| 21* | Office of Child Development, Home Start Program | 1 |
| 22 | Advisory Commission on Intergovernmental Relations | 1 |
| 23* | Agency for International Development | 1 |
| 24 | National Reading Center | 1 |
| 25* | Surgeon General's Scientific Advisory Commission on TV and Social Behavior | 1 |
| 26* | U.S. National Commission for UNESCO | 1 |
| 27 | Office of Consumer Affairs | 1 |
| 28* | Small Business Administration: Education Division | 1 |
| 29* | Office of New Careers | 1 |
| 30* | Federal Communications Commission | 1 |
| 31 | Commission on Civil Rights (CCR) | 1 |
| 32 | Office of Naval Research (ONR) | 1 |
| 33* | New England Program in Teacher Education | 1 |
| 34 | Organisation for Economic Cooperation and Development (OECD) (France) | 1 or 2 |
| 35 | Toronto Board of Education (Canada) | 1 |
| 36* | Dade County Public Schools | 1 |
| 37 | National Center for Health Statistics | 1 |
| 38 | Civil Service Commission (CSC) Bureau of Training | 1 |
| 39 | Schools Council (UK) | 1 (free) |
| 40* | Federal Aviation Administration | 1 |
| 41 | National Institute of Mental Health, Mental Health Study Center | 1 |
| 42* | University of Pittsburgh: University-Urban Interface Program | 1 |
| 43 | Air Force Reserve Officers Training Corps (DOD) | 1 |
| 44 | National Center for Health Services Research | 1 |
| 45 | Human Resources Research Organization (HumRRO) | 1 |

* inactive

FIGURE II-22: ERIC FACILITY ACQUISITIONS ARRANGEMENTS LIST (SAMPLE PAGE)

will either obtain the documents or let the Clearinghouse know if they are unavailable. Central ERIC also occasionally requests the Facility to obtain specific titles.

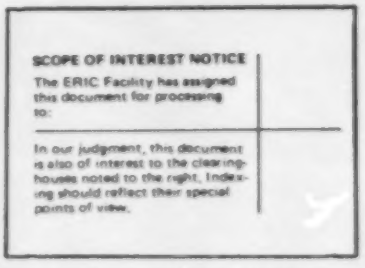
(2) Scanning

Serial publications, newsletters, and brochures of the organizations within the Facility's scope are regularly scanned. GPO's *Monthly Catalog of Government Publications* is reviewed cover-to-cover every month for education-related documents. NTIS's *Government Reports Announcements* (GRA) is also scanned (particularly Section 5) for this purpose. In each case, the Facility first attempts to obtain relevant documents from the original source before considering purchase.

Publication lists, news releases, etc., outside the Facility's scope of interest are forwarded to the appropriate Clearinghouses.

3. Assignment of Documents to Clearinghouses

All documents received by the Facility are assigned to the single most appropriate Clearinghouse for evaluation and selection. The proper assignment is determined by reference to the Facility-maintained *ERIC Clearinghouse Scope of Interest Guide*. When a document overlaps the scope of two or more Clearinghouses, the Facility assigns the document to the Clearinghouse with, in its judgment, the strongest claim to jurisdiction over the subject matter of the document. However, a copy of the Title Page is transmitted to the other interested Clearinghouses, together with a sticker (Figure II-23) indicating where the basic assignment was made. The sticker serves to alert those Clearinghouses that might like to question the assignment; it also tells the Clearinghouse receiving the document that care should be taken in indexing to reflect the interests of the related Clearinghouses.


SCOPE OF INTEREST NOTICE

The ERIC Facility has assigned this document for processing to:

In our judgment, this document is also of interest to the clearinghouses noted to the right. Indexing should reflect their special points of view.

FIGURE II-23: SCOPE OVERLAP STICKER

No selection decisions are made at the Facility. All documents received are assigned. Even flyers, brochures, news releases, and handouts are forwarded to the Clearinghouses for their information (though such materials are not part of the statistical count of documents assigned).

4. *ERIC Acquisitions Arrangements* (EAA) Systemwide List

The Facility publishes semiannually a cumulative systemwide list of all Clearinghouse and Facility acquisitions arrangements. Entries cite the name of the organization, date of contact, level of reproduction release, authorization, authorizing person, and any additional explanatory notes. The list includes all organizations whose materials are regularly and routinely acquired by ERIC and its use helps to prevent duplicate acquisitions efforts and to facilitate the exchange of release forms.

5. Standard Forms Used By The Facility

A number of forms, cards, and stickers or labels are used by the Facility to help expedite work flow.

a. Form Letters

The Facility uses several form letters to serve a variety of recurring needs: e.g., "Request for Specific Document(s)," "General Solicitation," "Thank You Letter" (see Figures II-24, II-25, and II-26, respectively). On occasion, special form letters are prepared to meet specific needs: e.g., National Diffusion Network (NDN) needs (see Figure II-27).

b. Reply Cards

The Facility has a Standard Reply form which is used when disposition information is requested by the contributor. These forms are provided to contributors to affix to incoming documents, but contributors are encouraged to provide their own cards. On occasion special Reply Cards are prepared to meet specific needs, e.g., State Education Agency submissions, NDN submissions, (see Figures previously listed).

c. Reproduction Release Forms (Blanket and Individual)

The Facility is responsible for the two Reproduction Release forms used by the system. Modifications are made at Central ERIC's direction and supplies of both forms are stocked by the Facility. (See Figures previously listed.)

6. Recordkeeping

The acquisitions effort requires a number of files. Only those most relevant to external ERIC components will be described here.

a. In-Process File

A title card file is maintained of all documents coming into the Facility, whether solicited or unsolicited. This file is purged so as to contain only the last two years of data; the

ERIC PROCESSING AND REFERENCE FACILITY
4833 RUGBY AVENUE, SUITE 303, BETHESDA, MARYLAND 20014 • (301) 656-9723
*OPERATED FOR* THE NATIONAL INSTITUTE OF EDUCATION *by* ORI, Inc., Information Systems Division

The Educational Resources Information Center (ERIC) is a nationwide computer-based information system funded by the National Institute of Education to obtain and screen documents relevant to the field of education for inclusion in the monthly abstract journal, Resources in Education (RIE). These reports are then made available to our users in microfiche and paper copy through the ERIC Document Reproduction Service (EDRS). May we please have a complimentary copy (two, if possible) of the following to consider for RIE? If we may make the document available to ERIC users, please fill out and return the enclosed Reproduction Release form with the complimentary copy.

Your attention to this request is appreciated. We will notify you if the document is selected for RIE and we welcome other reports that you wish to deposit in the ERIC data base.

Very truly yours,

Grace Sundstrom

(Mrs.) Grace Sundstrom
Acquisitions Librarian

Enclosure

FIGURE II-24: ERIC FACILITY FORM LETTER—REQUEST FOR SPECIFIC DOCUMENT(S)

ERIC®
PROCESSING AND REFERENCE FACILITY
4833 RUGBY AVENUE, SUITE 303, BETHESDA, MARYLAND 20014 • (301) 656-9723
*OPERATED FOR* THE NATIONAL INSTITUTE OF EDUCATION *by* ORI, Inc., Information Systems Division

The subject matter encompassed in this project is of interest to the Educational Resources Information Center (ERIC), of the National Institute of Education (DHEW). If you would be kind enough to forward two clear copies of the final report or other documents resulting from the project, such materials will be evaluated for possible abstracting and announcement in Resources in Education (RIE).

Under the sponsorship of the National Institute of Education, ERIC is a decentralized network of clearinghouses designed to bring information about education to the attention of educators and researchers. Through the Government Printing Office, ERIC publishes the monthly abstract journal, RIE, which announces recently completed reports of interest to the educational community.

If selected, the results of your work will be disseminated around the world automatically on microfiche to over 600 education-oriented organizations and in machine-readable form to the many subscribers to the ERIC tapes. Individuals who learn of your work through the RIE announcement can order the document from the ERIC Document Reproduction Service (EDRS) in either paper copy or microfiche. Therefore, should your own supply be exhausted, you can always refer requests for reprints to EDRS.

Thank you for your cooperation.

Yours truly,

Grace Sundstrom

(Mrs.) Grace Sundstrom
Assistant Acquisitions Librarian

GS:sep

P.S. There is no fee for placing documents in the ERIC system.

FIGURE II-25: ERIC FACILITY FORM LETTER—GENERAL SOLICITATION

ERIC

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*OPERATED FOR* THE NATIONAL INSTITUTE OF EDUCATION *by* ORI, Inc., Information Systems Division

We acknowledge with thanks receipt of the material you recently submitted to the Educational Resources Information Center (ERIC). We sincerely appreciate your contribution. The material will be assigned to the most appropriate Clearinghouse where it will be evaluated for announcement in the abstract journal, Resources in Education (RIE). Please allow four to five months between receipt of material and, if selected, final announcement in RIE.

If you have available or develop other reports you believe would be of interest to educators, we would also like to receive two copies of each of these documents for the ERIC system.

Thank you for your interest in ERIC.

Very truly yours,

Grace Sundstrom

(Mrs.) Grace Sundstrom
Acquisitions Librarian

GS/lj

FIGURE II-26: ERIC FACILITY FORM LETTER—THANK YOU LETTER

ERIC®
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*OPERATED FOR* THE NATIONAL INSTITUTE OF EDUCATION *by* ORI, Inc., Information Systems Division

Dear Colleague:

The Educational Resources Information Center (ERIC) invites all National Diffusion Network D/Ds and SFs (Developer/Demonstrators and State Facilitators) to submit NDN-related materials to ERIC.

USOE's Division of Educational Replication is interested in seeing that as many NDN materials are submitted to ERIC as possible. It is believed that ERIC can assist in making school people aware of the NDN, its publications, services, and Exemplary Programs. In addition, both NDN and ERIC are continuing to explore how NDN participants may use the ERIC system as a resource to improve their own effectiveness.

In August 1978, at the National Dissemination Forum, "Guidelines for Submitting NDN Materials to ERIC" were distributed. Additional copies of these guidelines are available from the ERIC Facility upon request. To facilitate your submission of documents, we are enclosing two "ERIC Reply Cards," two "Reproduction Release Forms," and a "Blanket Reproduction Releast Form." When you submit a publication, please use these forms as indicated:

- *ERIC Reply Card*
  Complete and return one card per document submitted. Once disposition of your publication is determined, the card will be returned to you.

- *Reproduction Release Form*
  Complete one form per document and attach to the document, OR, use the Blanket Reproduction Release Form.

- *Blanket Reproduction Release Form*
  Complete this form when submitting a large quantity of material.

Let us know when you need additional copies of any of these forms.

ERIC sincerely appreciates the effort made by all the D/Ds and SFs who have already submitted documents to ERIC. Currently, a computer search is underway to identify all NDN documents already in ERIC. The results will be compiled into a bibliography and made available to ERIC system users on a world-wide basis.

If you have any questions concerning the submission of NDN documents to ERIC, please feel free to call or write us at the ERIC Facility or contact one of the NDN-ERIC liaison committee members listed in the June NDN newsletter.

Very truly yours,

Grace Sundstrom

(Mrs.) Grace Sundstrom
Acquisitions Librarian

FIGURE II-27: ERIC FACILITY FORM LETTER—NATIONAL DIFFUSION NETWORK

older cards are archived. This file records the title, date received, Clearinghouse assignment, and any other important information, providing a duplicate check and a measure of location control over all Facility receipts.

b. Acquisitions Arrangements File

Individual files are kept on each formal acquisitions arrangement, including all correspondence and all Reproduction Release information.

7. Reporting to Central ERIC

The following reports are provided to Central ERIC:

- Acquisitions Department activities are reported in the Facility's biweekly *Narrative Report* to Central ERIC.
- Acquisitions statistics are reported in the monthly *ERIC Facility Statistics Report* and the quarterly *Acquisitions Summary Report*.
- Special ad hoc reports are prepared throughout the year, at Central ERIC's request, on such subjects as SEA receipts, foreign receipts, NEA receipts, NDN receipts, etc.

8. Miscellaneous

a. Women's Educational Equity Communications Network (WEECN)

The Facility regularly receives documents from WEECN. The documents come with a special instruction sheet explaining WEECN's interests. These documents are handled as regular input.

b. National Diffusion Network (NDN)

The Facility cooperates with NDN in an effort to see that all NDN documents are considered for input to ERIC. The Facility has prepared special form letters for soliciting new documents, special Reply Cards, and a sheet outlining the special handling and processing NDN documents should receive.

c. Alerting Services

Occasionally, the Facility will engage in activities calculated to alert the Clearinghouses to new publications of interest, e.g., Library of Congress proof sheets (for new 3x5 catalog cards); Baker & Taylor Current Awareness Service, etc. In all such cases, the responsibility for deciding upon further acquisitions action rests with the Clearinghouse.

G. *Current Index to Journals in Education* (CIJE)

CIJE deals with journal articles, not the report literature. Acquisitions for CIJE deal, therefore, with subscriptions to appropriate journals.

The CIJE Contractor maintains a complete list of all journals currently covered on a regular basis, comprehensively or selectively. This list is published as the "Source Journal List" in each monthly issue of CIJE. (As of January 1980 this list cited 876 journals.)

Each journal covered is assigned, wherever possible, on the basis of its subject matter, to a single ERIC Clearinghouse. Journals that cover more than one area of the field of education and journals that fall outside the scope of any existing Clearinghouse are assigned for coverage to the CIJE Contractor. The "Source Journal List" identifies the organization responsible for each journal. The responsible ERIC component must subscribe to the journal (or obtain a complimentary subscription) and must ensure that all issues are obtained and screened. (See Figure II-28 for Clearinghouse request for complimentary journal subscription.) It is worth emphasizing that when a Clearinghouse is responsible for a given journal it is responsible for *all* education-related articles in that journal and not just those within its scope.

New journals are the responsibility primarily of the Clearinghouses; however, a new journal may be nominated for coverage by any ERIC component. Information concerning a candidate journal should be sent, together with any supporting information, to the relevant Clearinghouse. If the relevant Clearinghouse cannot be determined, the candidate should be sent to the ERIC Facility which, in conjunction with Central ERIC, will make this determination.

The responsibility for deciding whether to cover a new journal rests with the Clearinghouse. When the total number of journals covered by CIJE is considered by the CIJE Contractor to be at a maximum, it will generally be necessary to delete a marginal journal in order to add a significant journal. If it is necessary, in the opinion of the Clearinghouse, to add a new journal without a corresponding deletion, justification for this decision should be sent to the Central ERIC monitor of CIJE.

Journals covered by CIJE can be classified into three groups:

1. Comprehensively Covered Journals

Journals of high quality that are concerned entirely with the field of education are processed "cover-to-cover," i.e., all articles are cataloged and indexed. This excludes editorials, letters to the editor, schedules of events, newsletters, book reviews, regular columns, and advertising. It is useful to the practicing educator, reference librarian, educational researcher,

COMPLIMENTARY JOURNAL SUBSCRIPTIONS

# Clearinghouse on Teacher Education

ONE DUPONT CIRCLE, N.W., SUITE 616 • WASHINGTON, D.C. 20036 • 202/293-7280

SPONSOR

American Association of Colleges for Teacher Education (fiscal agent)

SPONSOR

American Alliance for Health, Physical Education, and Recreation

SPONSOR

The Association of Teacher Educators

SPONSOR

Instruction and Professional Development/ National Education Association

Dear Editor:

The ERIC Clearinghouse on Teacher Education would like to request a complimentary subscription to your journal in order to keep up-to-date on publications and conferences in the field of education. Occasionally, important articles from our complimentary subscription list are indexed in our monthly publication, Current Index to Journals in Education.

We are funded by the National Institute of Education to collect education documents and make them available to readers through a computerized retrieval system. The particular scope of interest of this clearinghouse covers teacher education, physical education, and health and recreation education.

We believe that the opportunity to receive your journal will help us to announce through ERIC valuable materials in education.

Sincerely yours,

Agnes Torres

Agnes Torres
Document Processing

In cooperation with the Educational Resources Information Center, **National Institute of Education**

SCOPE

The preparation and continuing development of elementary, secondary, and collegiate level instructional personnel, their roles and functions; and selected aspects of health education, physical education, and recreation education.

FIGURE II-28: TYPICAL CLEARINGHOUSE REQUEST FOR COMPLIMENTARY JOURNAL SUBSCRIPTION

or other user to be assured that all articles in such journals will be indexed by CIJE. Such journals are indicated by an asterisk in the "Source Journal Index."

2. Selectively Covered Journals

Journals of high quality that, while not concerned entirely with education, regularly contain some education-related articles, are processed selectively, i.e., articles not related to education are excluded, as are the miscellaneous types of materials referred to in the explanation of comprehensive coverage. Journals covered selectively appear in the "Source Journal Index" without an asterisk.

3. "Oneshot" Journals

Journals of high quality that occasionally may contain an article related to education are covered on a "oneshot" basis. These journals are not regularly monitored or indexed by any Clearinghouse. Detecting a relevant article in such a journal will often be accidental and fortuitous. It is permissible for a Clearinghouse to input any good quality, education-related article that may be found in a journal not regularly covered by another Clearinghouse. Journals of this type, from which oneshot articles are chosen, do not appear in the "Source Journal Index."

Articles of this type should be identified by writing "oneshot" in the comments column of the Clearinghouse Accession Log Sheet.

If the journal from which the "oneshot" article is being taken is not well known, it may be helpful to the user to include in cataloging the address of the journal. This decision is up to the Clearinghouse.

If a Clearinghouse finds that it is indexing one or more articles from each issue of such a journal, it should consider the journal for selective coverage status.